



# School Loan Change Form

Access Group, Inc. • P.O. Box 17162 • Wilmington, DE 19850-7162

**NOTE:** Changes to borrower information that may affect loan type cannot be corrected via this form. According to applicable laws, the borrower must approve all changes affecting loan type in writing, with an original signature of the borrower. Please see the instructions on the reverse side for a list of such items.

## Section I – Student and School Information (This section must be complete. Please complete a separate form for each application.)

Student Last Name:	Student First Name:	MI:	Student Social Security Number:
			/ /
Loan Term Begin Date:	Loan Term End Date:	Application Certification Date:	
/ /	/ /	/ /	
Loan Type:			
<input type="checkbox"/> Subsidized Stafford	<input type="checkbox"/> Unsubsidized Stafford	<input type="checkbox"/> Graduate PLUS	<input type="checkbox"/> Parent PLUS
<input type="checkbox"/> Dental Access®	<input type="checkbox"/> Graduate Access®	<input type="checkbox"/> Health Access®	<input type="checkbox"/> Law Access®
<input type="checkbox"/> Business Access®		<input type="checkbox"/> Comprehensive Access®	
<input type="checkbox"/> Medical Access®		<input type="checkbox"/> Sponsored Access®	
Name of School Official:		School Name:	Phone Number:
Signature of School Official:		School Code/Branch:	Date:
			/ /

## Section II – Loan Changes (Please complete both original and revised columns for items being changed.)

Loan Period: (Month/Day/Year – Month/Day/Year)	<b>Original</b>					<b>Revised</b>														
	From:	/	/	To:	/	/	From:	/	/	To:	/	/								
Grade Level: (Circle one)	1	2	3	4	5	1	2	3	4	5										
	or					or														
	A	B	C	D		A	B	C	D											
Enter the grade level of the student using these codes:	1 – First Year Undergraduate 2 – Second Year Undergraduate 3 – Third Year Undergraduate 4 – Fourth Year Undergraduate 5 – Fifth Year/Other Undergraduate (including continuing education students)					A – First Year Graduate/Professional B – Second Year Graduate/Professional C – Third Year Graduate/Professional D – Beyond Third Year Graduate/Professional														
Note: You cannot change a student's grade level from undergraduate to graduate/professional. You may only change from one grade level to a different grade level within the same enrollment category (undergraduate or graduate/professional).																				
Anticipated Graduation Date: (Month/Day/Year)	/ /					/ /														
Certified Loan Amount:																				
Note: For a private loan, if the new amount requested <b>does not exceed</b> the amount the borrower requested on the original Application, you may use this form to increase the certified loan amount. If the new amount requested <b>does exceed</b> the amount the borrower requested on the original Application, see Instructions for Section II on reverse.	Subsidized Stafford:	\$	_____				\$	_____												
	Unsubsidized Stafford:	\$	_____				\$	_____												
	Graduate PLUS:	\$	_____				\$	_____												
	Parent PLUS:	\$	_____				\$	_____												
	Private Loan:	\$	_____				\$	_____												
Recommended Disbursement Dates: (Month/Day/Year)	1st	_____			2nd	_____			1st	_____			2nd	_____						
	3rd	_____			4th	_____			3rd	_____			4th	_____						
Recommended Disbursement Amounts: (For Private Only)	1st	\$	_____		.00	2nd	\$	_____		.00	1st	\$	_____		.00	2nd	\$	_____		.00
	3rd	\$	_____		.00	4th	\$	_____		.00	3rd	\$	_____		.00	4th	\$	_____		.00

## Section III – Loan Cancellation/Refund or Eligibility Change (Please check box or complete date where applicable.)

Student withdrew* (Month/Day/Year)	/ /	<input type="checkbox"/> <b>Cancellation (refund attached)</b> <input type="checkbox"/> <b>Cancellation (refund not attached; forwarded under separate cover)</b> <input type="checkbox"/> <b>Cancellation prior to disbursement</b> <input type="checkbox"/> <b>Student never enrolled</b> <input type="checkbox"/> <b>Student requested cancellation/refund</b> <input type="checkbox"/> <b>Student eligibility changed</b> (Please complete Section II.)
* If the student enrolled for a prior loan term, please provide last date of enrollment.	/ /	
Student graduated (Month/Day/Year)	/ /	
Student granted a leave of absence (Month/Day/Year)	From: / / To: / /	
Other – Please explain:	_____	

## Section IV – Check Information (When disbursement checks are returned, subsequent disbursements will be cancelled unless a reissue is requested.)

Check Number	Check Amount	Reissue Requested	Date Requested
(Please check box. See instructions on reverse.)			
Subsidized Stafford:	\$ _____	<input type="checkbox"/>	____ / ____ / ____
Unsubsidized Stafford:	\$ _____	<input type="checkbox"/>	____ / ____ / ____
Graduate PLUS:	\$ _____	<input type="checkbox"/>	____ / ____ / ____
Parent PLUS:	\$ _____	<input type="checkbox"/>	____ / ____ / ____
Private Loan:	\$ _____	<input type="checkbox"/>	____ / ____ / ____
Were funds credited to borrower's account? (For EFT disbursed funds only)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

# Access Group, Inc.

## School Loan Change Form Instructions

Use this form when changing information originally certified on a loan application and when cancelling or returning a loan disbursement check. **PLEASE COMPLETE A SEPARATE FORM FOR EACH LOAN APPLICATION.**

**If you want to keep a copy for your files, remember to copy both the front and the back of the form.**

**NOTE: Changes to borrower information that may affect loan type cannot be corrected via this form.** According to applicable laws, the borrower must approve all changes affecting loan type in writing, with an original signature of the borrower. For Access Group private loans, these changes include:

- Citizenship status (field 5 on application P, the private loan programs application),
- “Are you the student for whom this loan is requested?” (field 13 on application P),
- Enrollment Status (field 23 on application P),
- Program of Study (field 24 on application P), and
- School Name (field 21 on application P, field 6 on the cosigner application, and field 13, Law School, on the Bar Examination Loan application)

If the information the borrower has provided about any of these items is incorrect, you must call your Account Executive at (800) 227-2151. He or she will institute the process of contacting the borrower to obtain the correct information in writing, with an original signature.

### Section I – Student and School Information

This section must be completed in all cases in order to process your loan change request.

### Section II – Loan Changes

Complete this section when changing information originally certified on a loan application. Please complete both the original and revised columns **of the items being changed.**

Note: To increase the Certified Loan Amount for a private loan:

- If the new amount requested **does not exceed** the amount the borrower requested on the original Application, you may use this form to increase the certified loan amount.
- If the new amount requested **does exceed** the amount the borrower requested on the original Application, the borrower must provide a signed copy of the appropriate Amendment to his/her original Loan Application. Contact your assigned Account Executive to request that a copy of the Amendment be sent to a student or to your institution.

### Section III – Loan Cancellation/Refund or Eligibility Change

- Please check the box or provide a date where applicable.
- When changing a student's loan eligibility, Section II must also be completed.
- When submitting a cancellation (refund attached), Section IV must also be completed.

### Section IV – Check Information

Complete this section when returning a disbursement check or forwarding a refund check.

- Always provide the check number and the check amount for each check that is returned.
- If returning an amount that was disbursed via EFT, please indicate whether the funds were credited to the borrower's account by checking yes or no.
- To reissue a loan check, please check the appropriate box and indicate the requested date of the reissue.  
Note: There may be situations where checks cannot be reissued. Please contact your assigned Account Executive for additional details.

**Please mail or fax the completed form to Access Group, Inc. If you have any questions about completing this form, please contact your Account Executive toll-free at (800) 227-2151.**

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